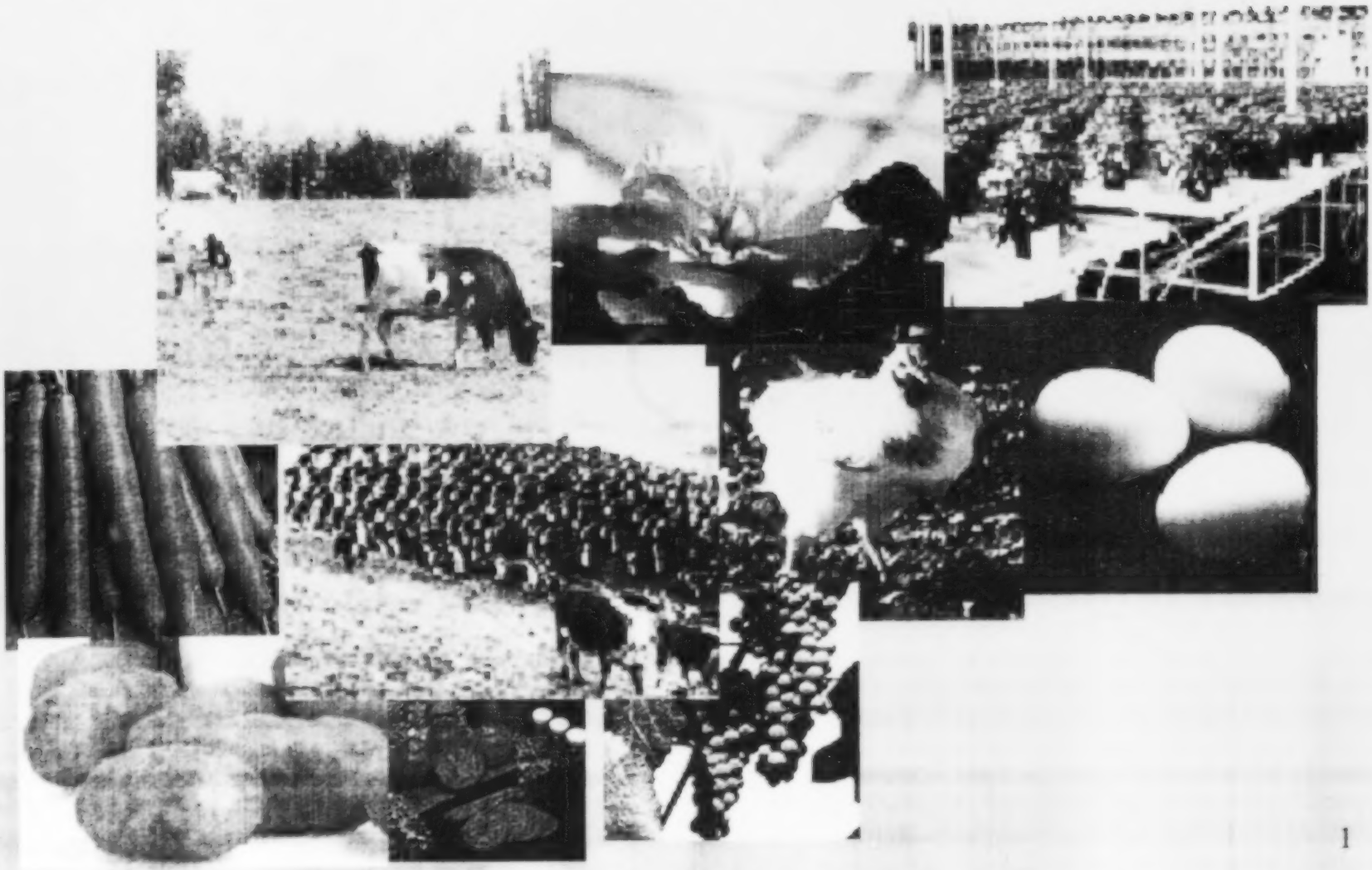
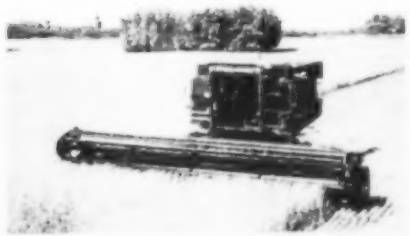
Agrifood Sector Overview



BC Agri-Food System at a glance, 2002…

105-03581/



Farm and Food Imports (including fish)
Foreign: $3.4 billion
Interprov: $ 3.4 billion

TOTAL CONSUMER SALES: $21.9 billion[1]

Total jobs: 280,279[2]

Primary Agriculture
Sales: $2.2 billion
Jobs: 30,100[3]
GDP: $1.74 billion[4]

Primary Fisheries
Sales: $668 million[5]
Jobs: 3,300
GDP: $263.6 million[7]

Food/Beverage Processing
Sales: $5.3 billion
Jobs: 27,000
GDP: $1.643 billion[4]

Food Wholesaling
Sales: $6.8 billion
Jobs: 16,800[6]

Food Retail & Food Service Industry
Sales: $17.0 billion
Jobs: 193,600

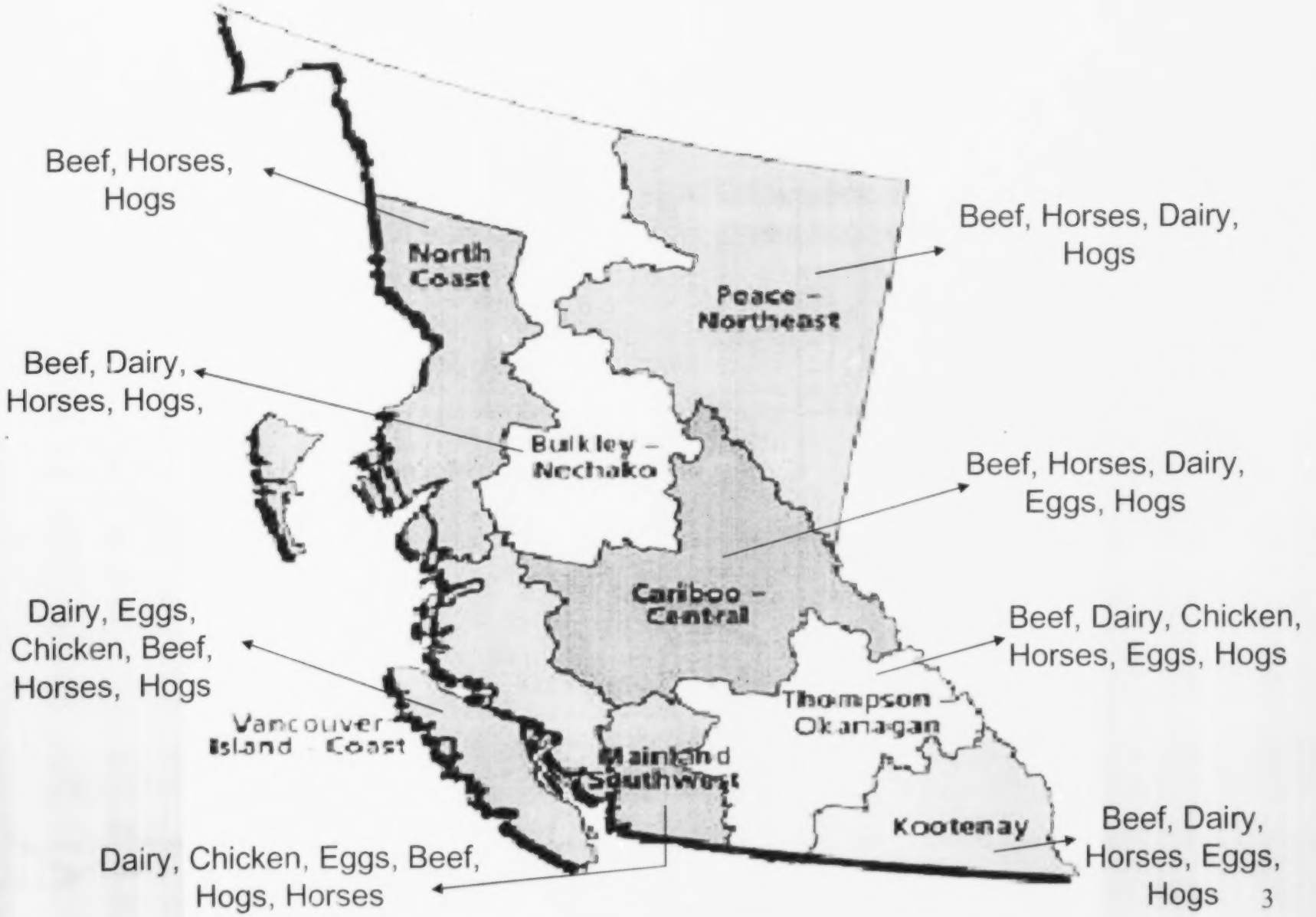
BC consumers

Farm and Food Exports (including fish)
Foreign: $2.5 billion
Interprov: $2.2 billion

Other consumers

Updated Feb. 2004. based on 2002 data

Livestock Distribution in BC



Livestock Farm Cash Receipts per Region by Farm Type ($'000) Top 10

	Dairy	Beef	Hogs	Eggs	Chicken	Turkey	Other Poultry	Horses	Other Livestock	Bees
Vancouver Island/Coast	43,052	8,916	1,123	8,399	8,391	*	1,392	5,177	5,437	683
Lower Mainland/Southwest	257,052	40,169	38,282	85,929	165,680	27,335	100.774	25,177	14,882	1,022
Thompson/Okanagan	38,691	101,187	1,987	7,234	18,514	*	4,159	13,118	2,507	1,187
Kootenay	8,908	20,743	106	413	*	-	90	3,000	1,210	323
Cariboo	2,248	57,515	272	1,888	*	*	56	3,583	831	137
North Coast	-	731	17	*	*	*	*	105	82	*
Nechako	7,400	30,832	140	17	*	*	*	1,353	-	-
Peace River	2,028	53,162	694	*	*	-	*	2,276	9,676	200

- zero or too small to be expressed; * - confidential (too few observations)

Source: Census of Agriculture 2001

Crop Distribution in BC

Floriculture, Field Vegetables, Nursery, Hay

Grains & Oilseeds, Forage Seed, Hay, Floriculture, Nursery, Field Vegetables

Floriculture, Hay Grains & Oilseeds, Nursery, Field Vegetables

Floriculture, Hay, Field Vegetables, Nursery, Berries

Floriculture, Nursery, Field Vegetables, Greenhouse Vegetables, Hay, Berries

Treefruit, Grapes, Nursery, Floriculture, Hay, Field Vegetables

Nursery, Field Vegetables, Floriculture, Hay, Treefruit, Grains & Oilseeds

Floriculture, Greenhouse Vegetables, Berries, Field Vegetables, Nursery

Crop Farm Cash Receipts per Region by Farm Type ($'000) Top 10 ...

	Floriculture	Nursery	Treefruit	Berries	Grapes
Vancouver Island/Coast	26,865	5,771	601	2,094	1,570
Lower Mainland/Southwest	239,301	58,564	2,298	86,374	447
Thompson/Okanagan	16,879	21,511	90,199	1,053	25,106
Kootenay	3,325	6,008	2,511	143	86
Cariboo	28,344	249	*	38	-
North Coast	428	182	-	*	-
Nechako	5,120	201	*	-	-
Peace River	1,070	521	-	*	-

- Not applicable; * - confidential (too few observations)

Source: Census of Agriculture 2001

Crop Farm Cash Receipts per Region by Farm Type ($'000) Top 10 (concluded)

	Grains & Oilseeds	Field Vegetables	Greenhouse Vegetables	Hay	Mushrooms
Vancouver Island/Coast	337	5,259	4,316	3,031	195
Lower Mainland/Southwest	710	65,802	128,228	4,019	43,978
Thompson/Okanagan	1,357	3,512	3,449	7,259	*
Kootenay	1,306	4,583	537	2,944	*
Cariboo	*	323	67	3,456	*
North Coast	*	419	*	31	*
Nechako	842	45	*	4,314	-
Peace River	25,188	325	-	17,229	-

- Not applicable; * - confidential (too few observations)

Source: Census of Agriculture 2001

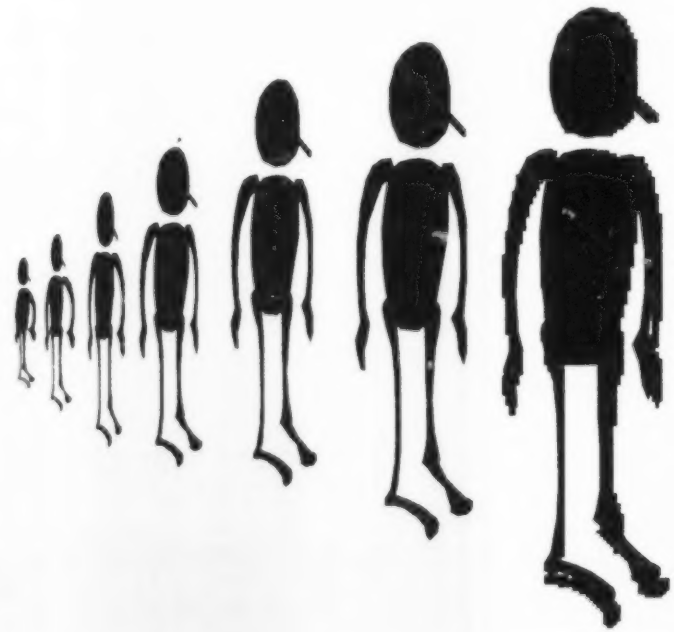
BC Agriculture Industry Overview

- BC agriculture most diverse in Canada
  - over 250 commodities
  - many climatic zones and conditions
- positives: … **diverse**, Pacific Rim location, favourable climate, entrepreneurial people
- negatives: … **diverse**, price takers, poor economies of scale, high input costs, global competition

Total Food Chain Employment, B.C. 2002 (Number of persons)

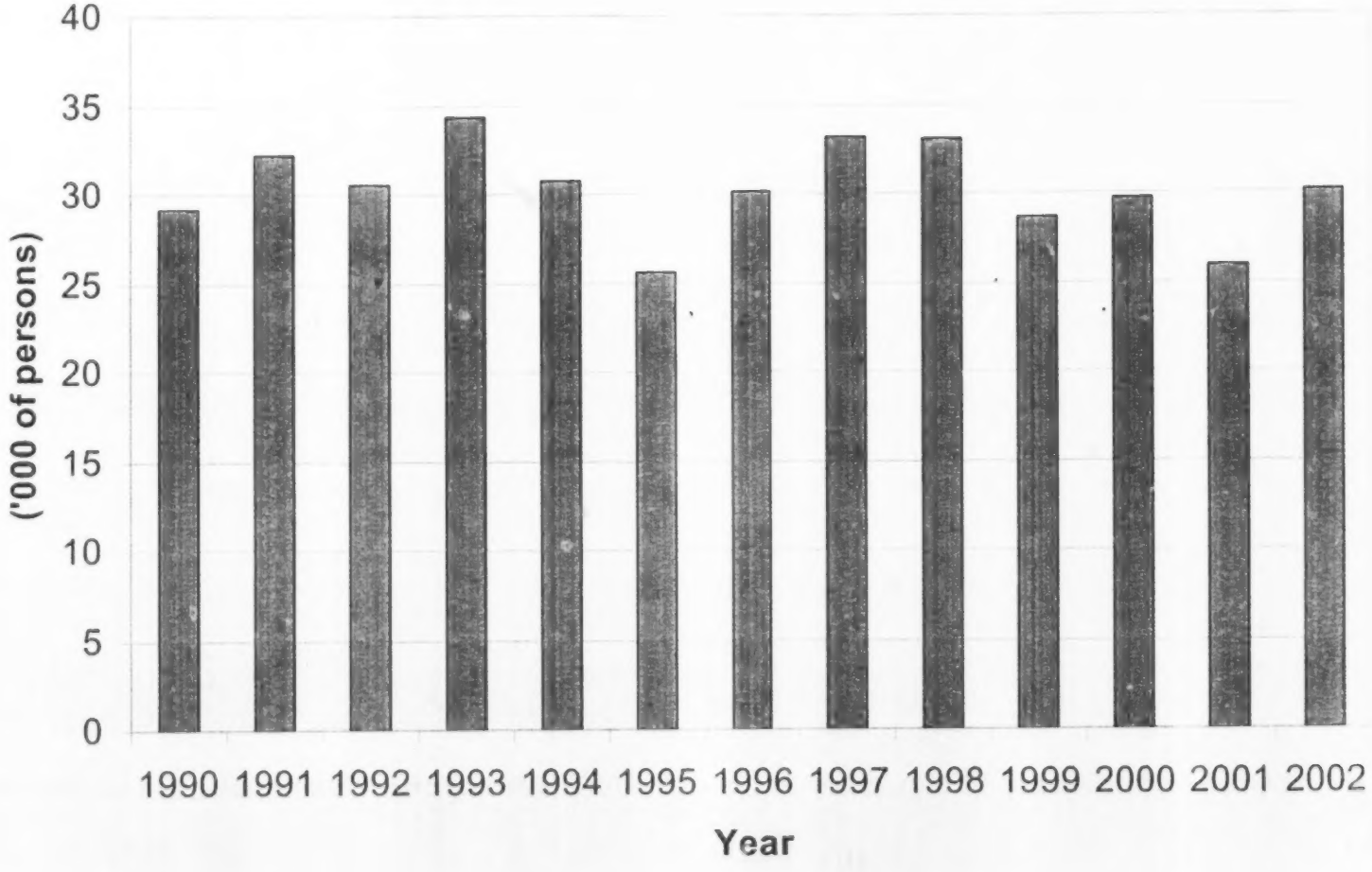
All Industries	1,973,400
Agriculture Food System	**280,279**
Primary Agriculture	30,100
Agriculture Food and Beverage Processing	27,000
Food Service	129,200
Retail Food	64,400
Specialized Retail (Health Food)	2,764
Floral & Garden Retail	4,500
Food Wholesale	16,800
Transportation & Storage	1,531
Other Support Services	684
Fisheries	3,300

One in seven of us work in an agriculture/food related industry.



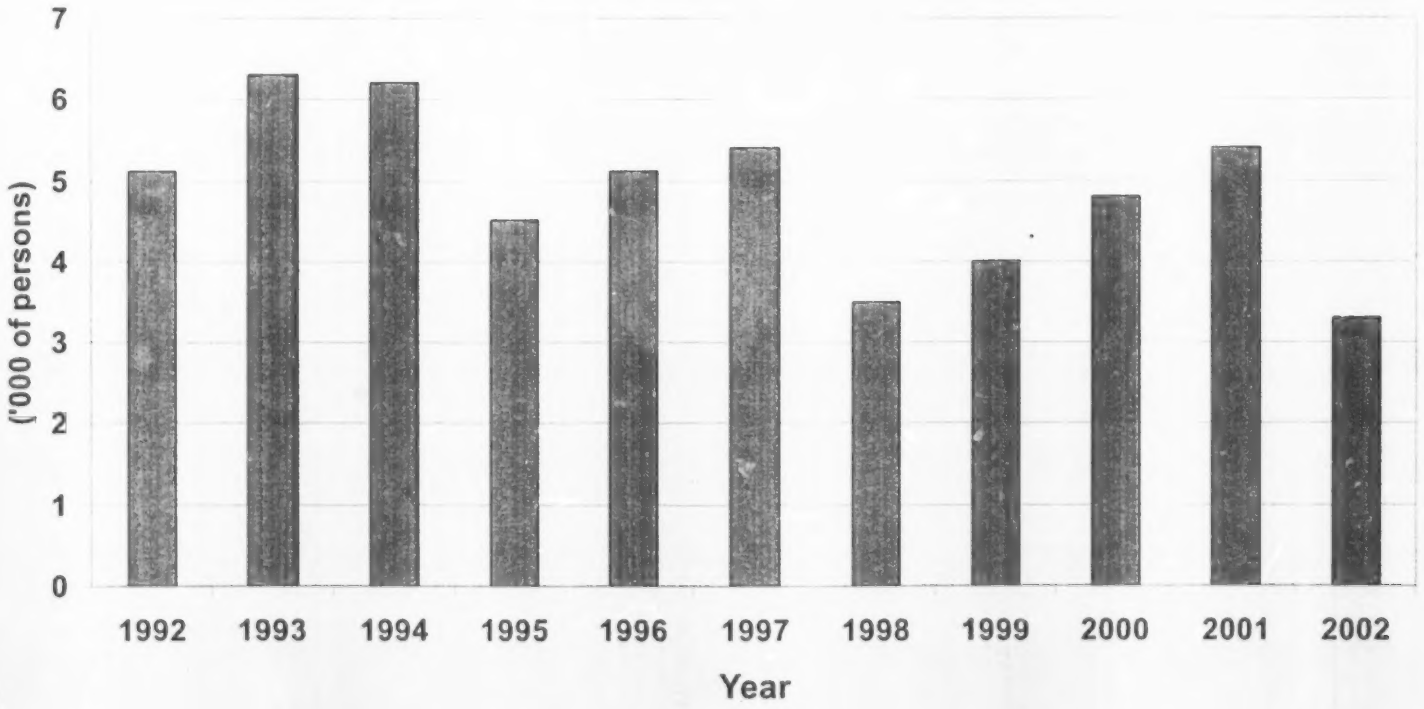
Source: Statistics Canada, MAFF Health Food Store survey

Agricultural Employment in BC (Thousands of Persons)



Source: BC STATS; Statistics Canada Labour Force Survey

Fishing Industry Employment in BC (thousands of persons)

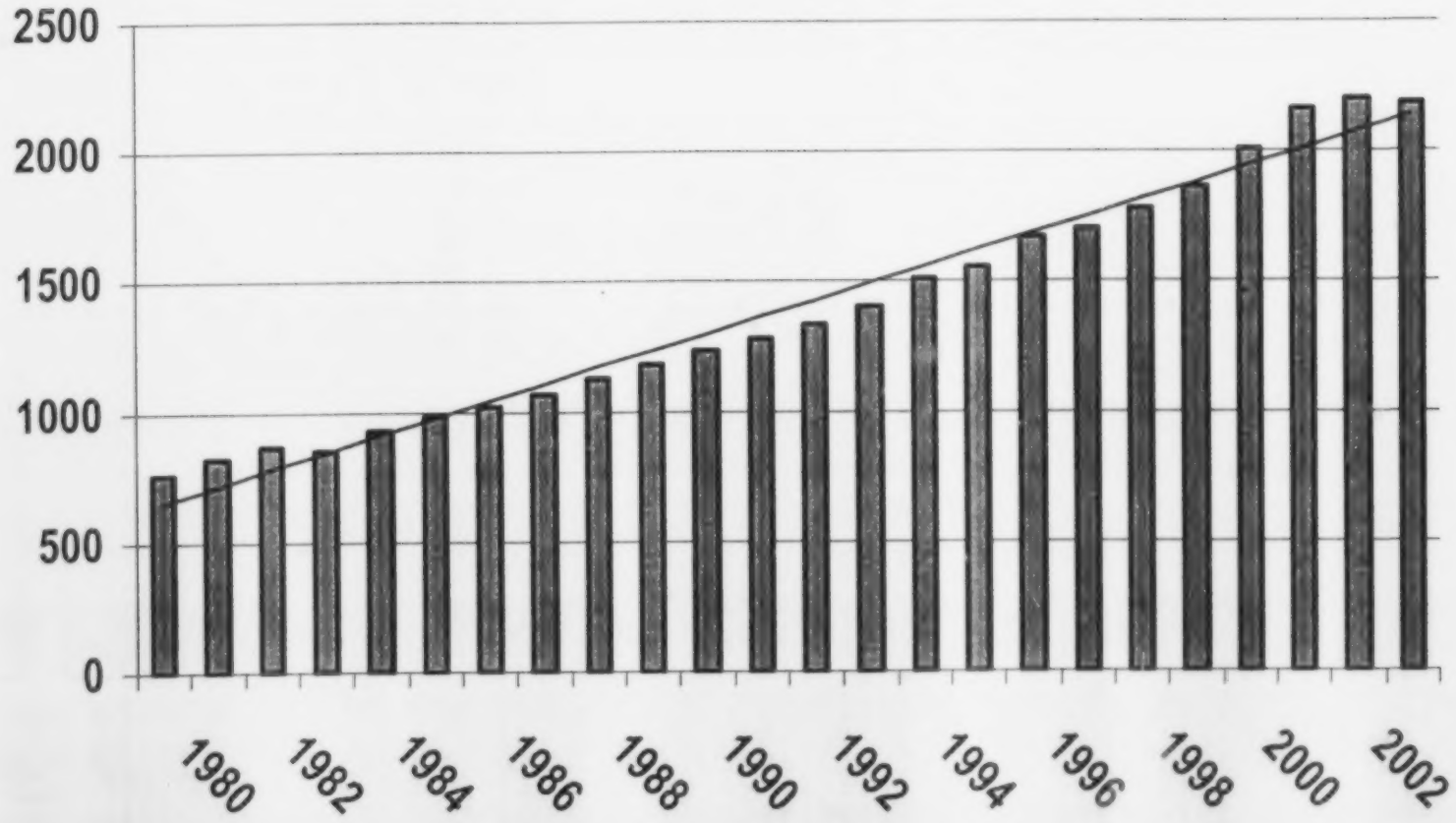


Source: BC STATS; Statistics Canada Labour Force Survey

Agricultural Land Reserve ...

- Less than 5% total land area in BC suitable for farming
- Land in Agricultural Land Reserve (ALR) - 4.7 mil ha
- Over half is Crown land including range
- The remainder is private land including crops, pasture, rangeland and some forest

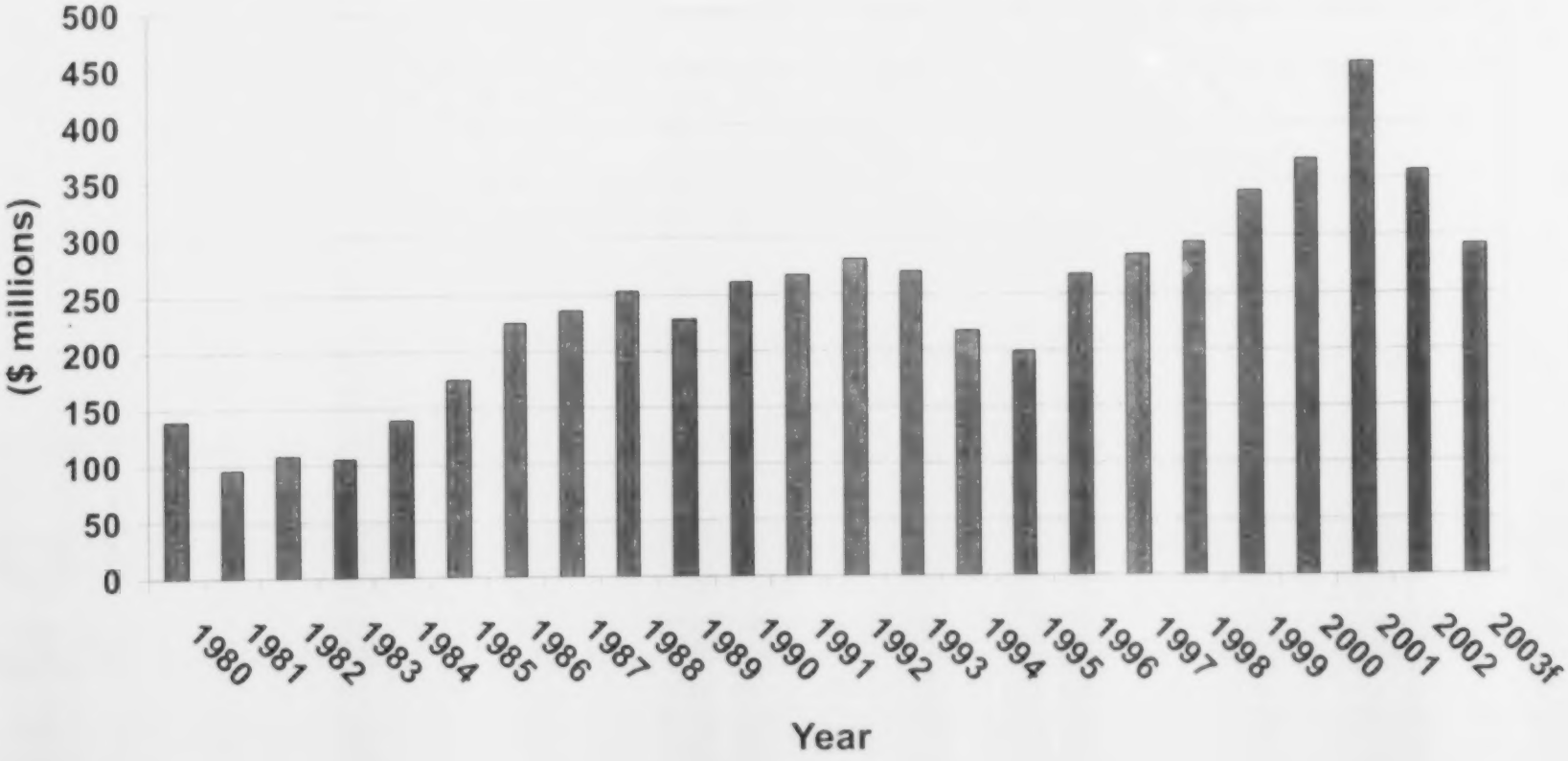
B.C. Farms Market Sales* ($ Millions)



*Note: Market Sales do not include Program Payments

Source: Statistics Canada, Farm Cash Receipts

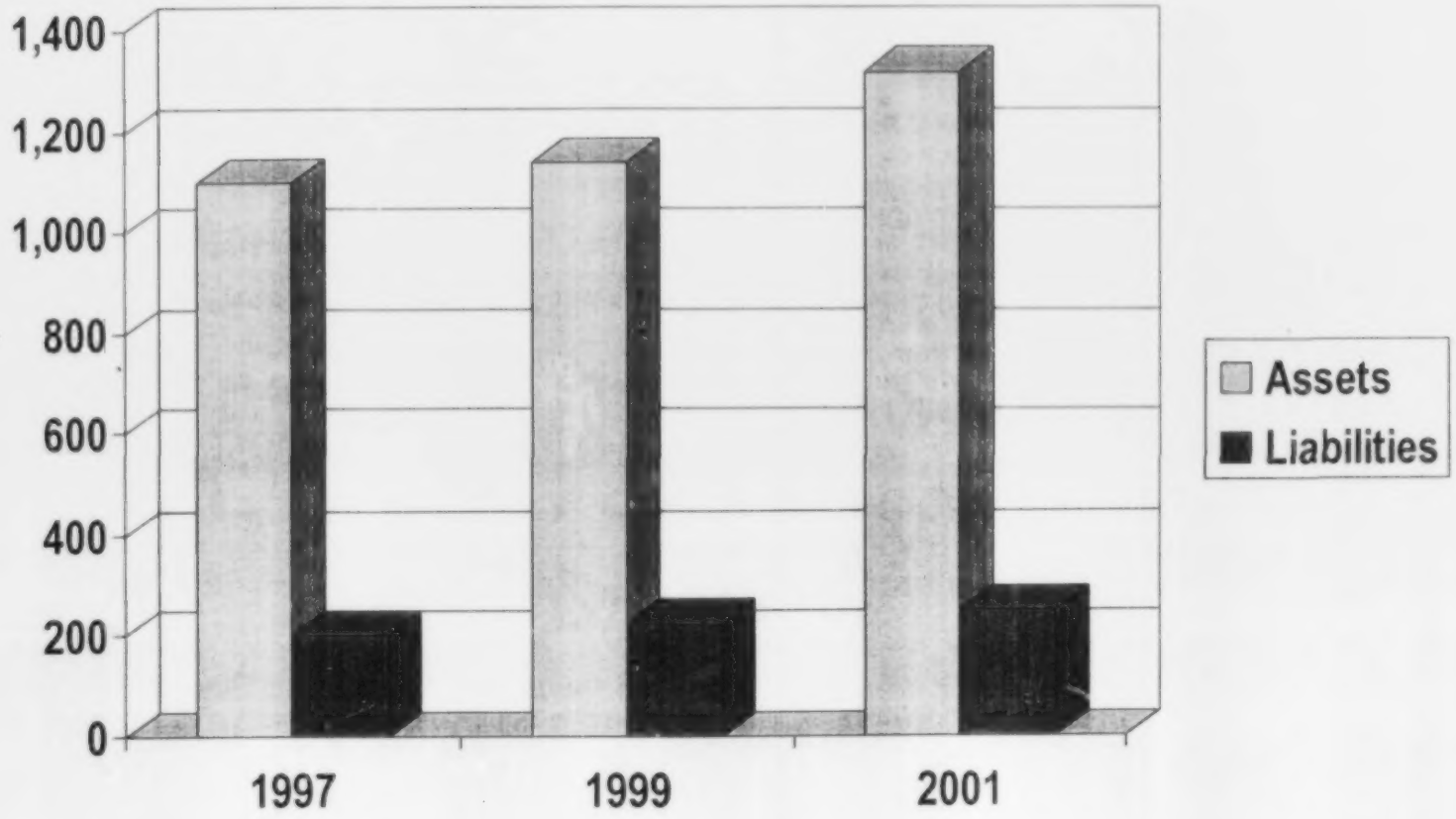
B.C. Farms' Net Cash Income* ($ thousands)



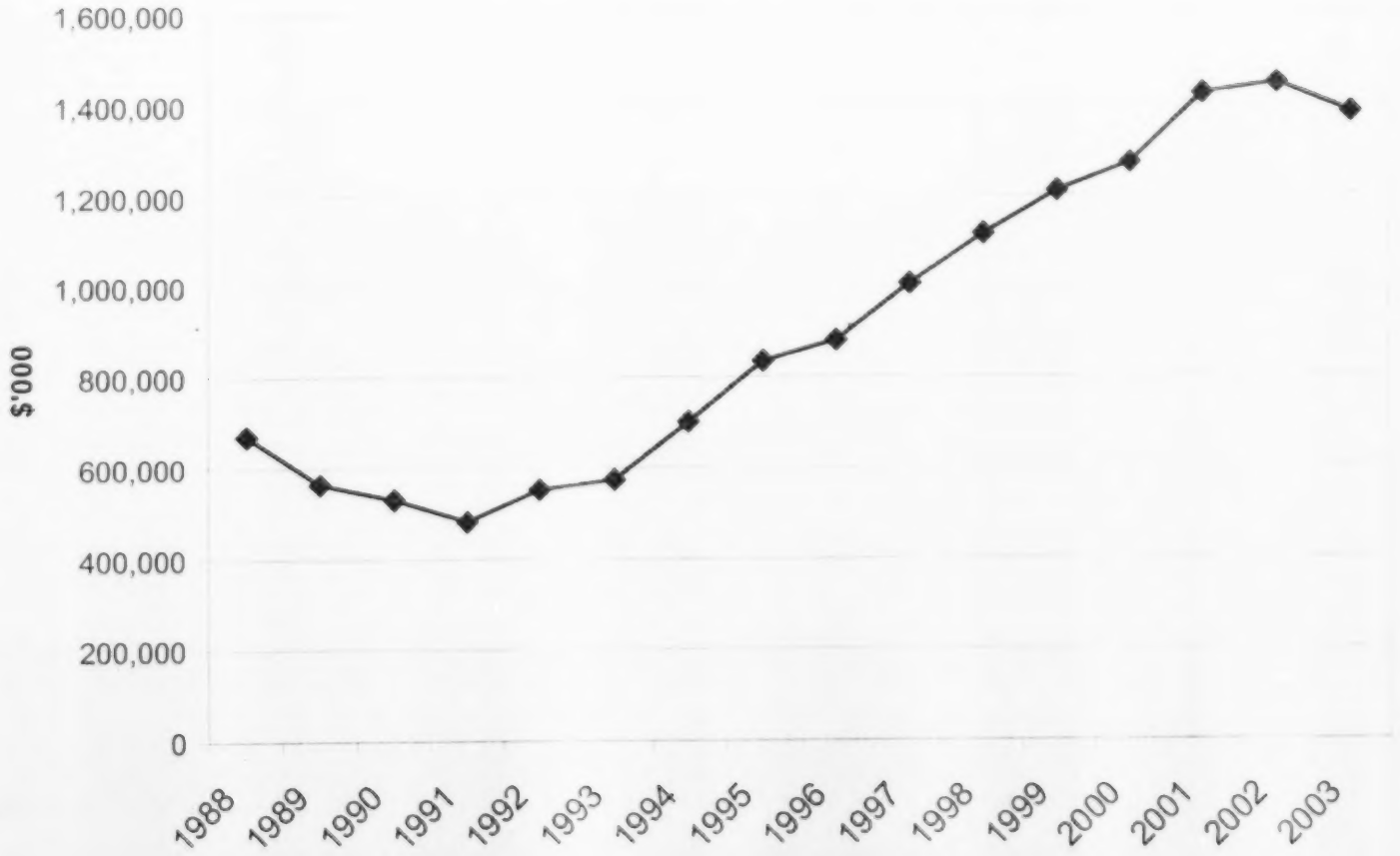
* Net Cash Income is the difference between the farmer's cash receipts and operating expenses.

Source: Statistics Canada

Assets and Liabilities, B.C. Farms with revenues of $10,000 or higher ($ million)



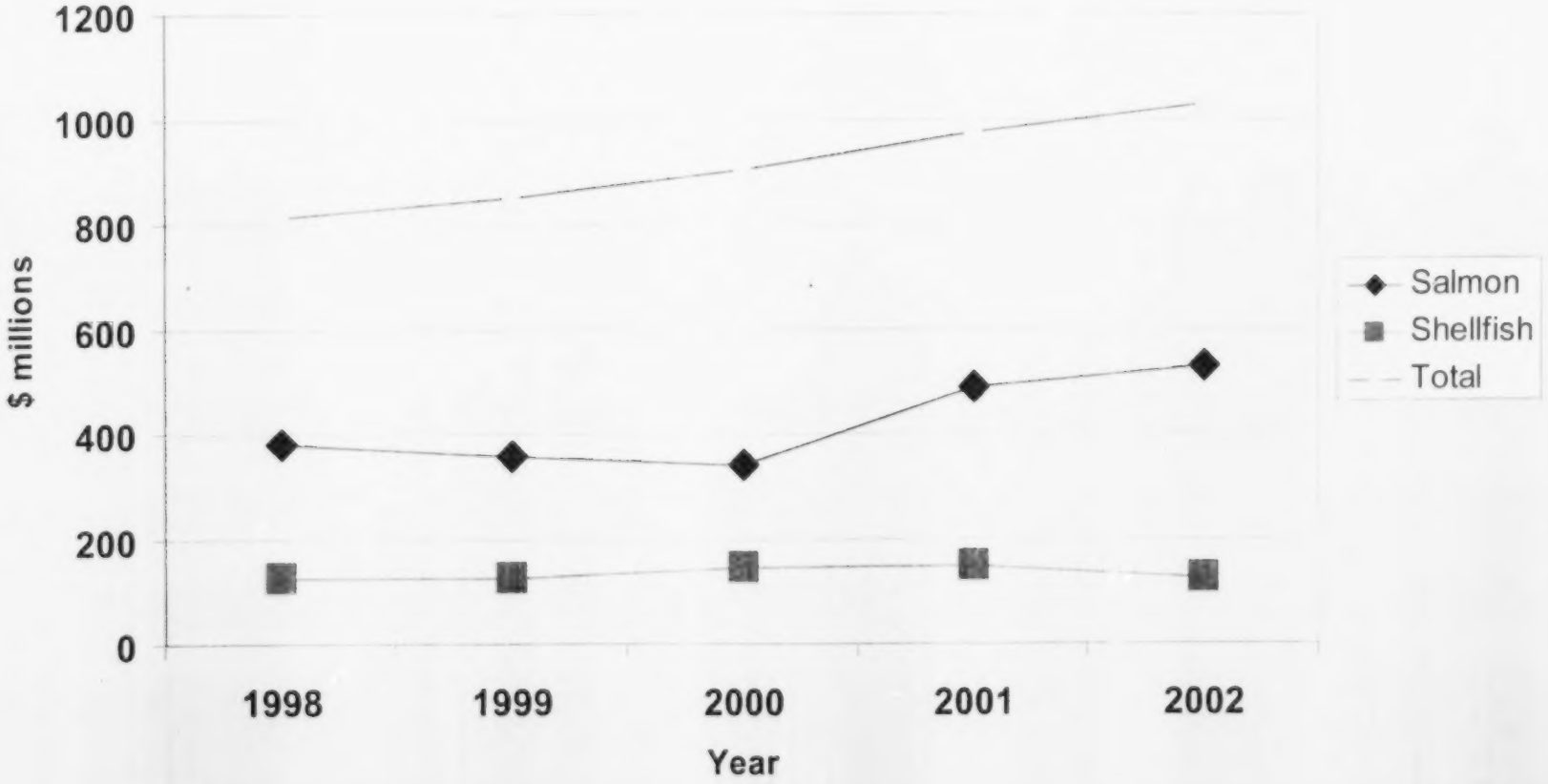
Value of BC Agri-food Exports (Excluding Fish)



- Agriculture and agri-food exports were $1.4 billion (Cdn) in 2002
- Up 45% over the last five years.

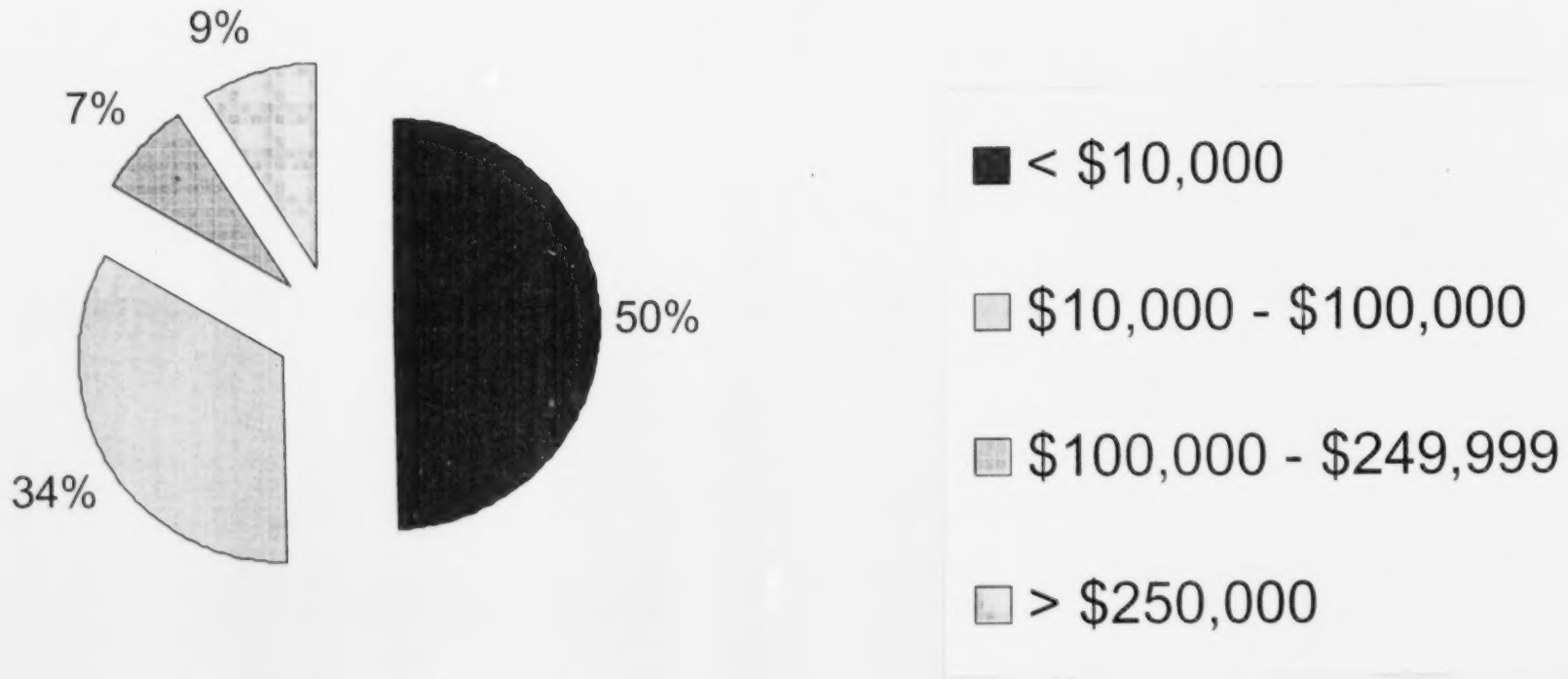
Source: BC Trip Data 2003

Value of Fish Exports 1998 – 2002 ($ millions)

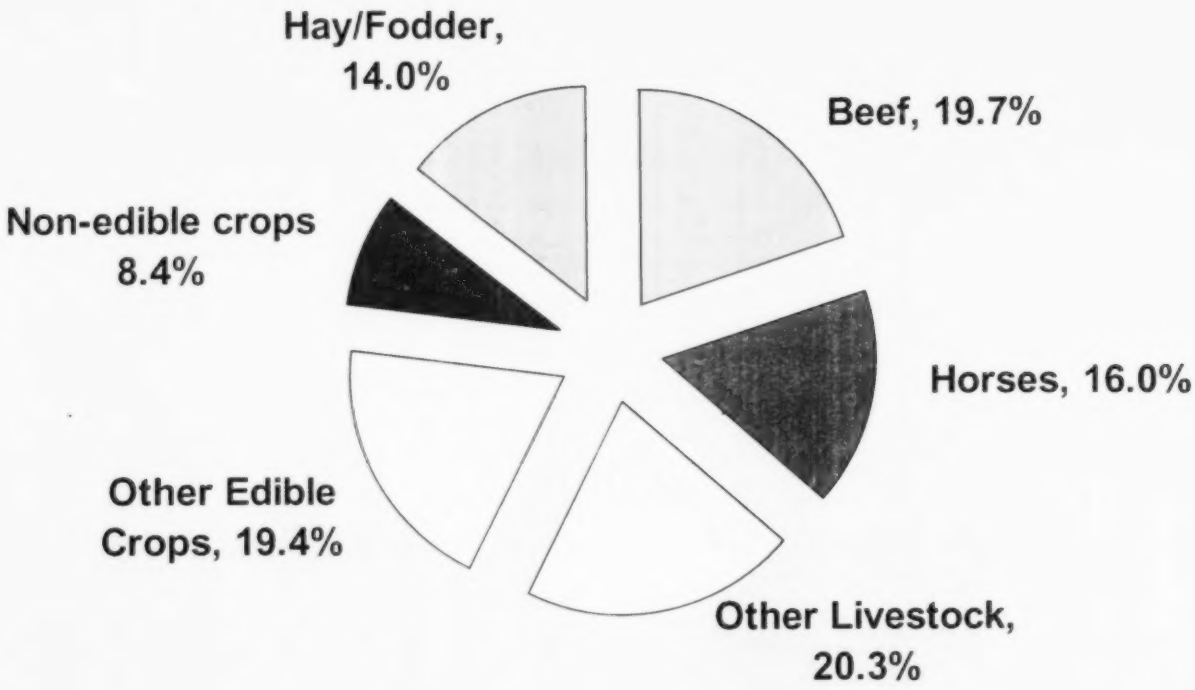


BC STATS Trip Data

Number of Farms by Revenue Class (2001 Census Data)



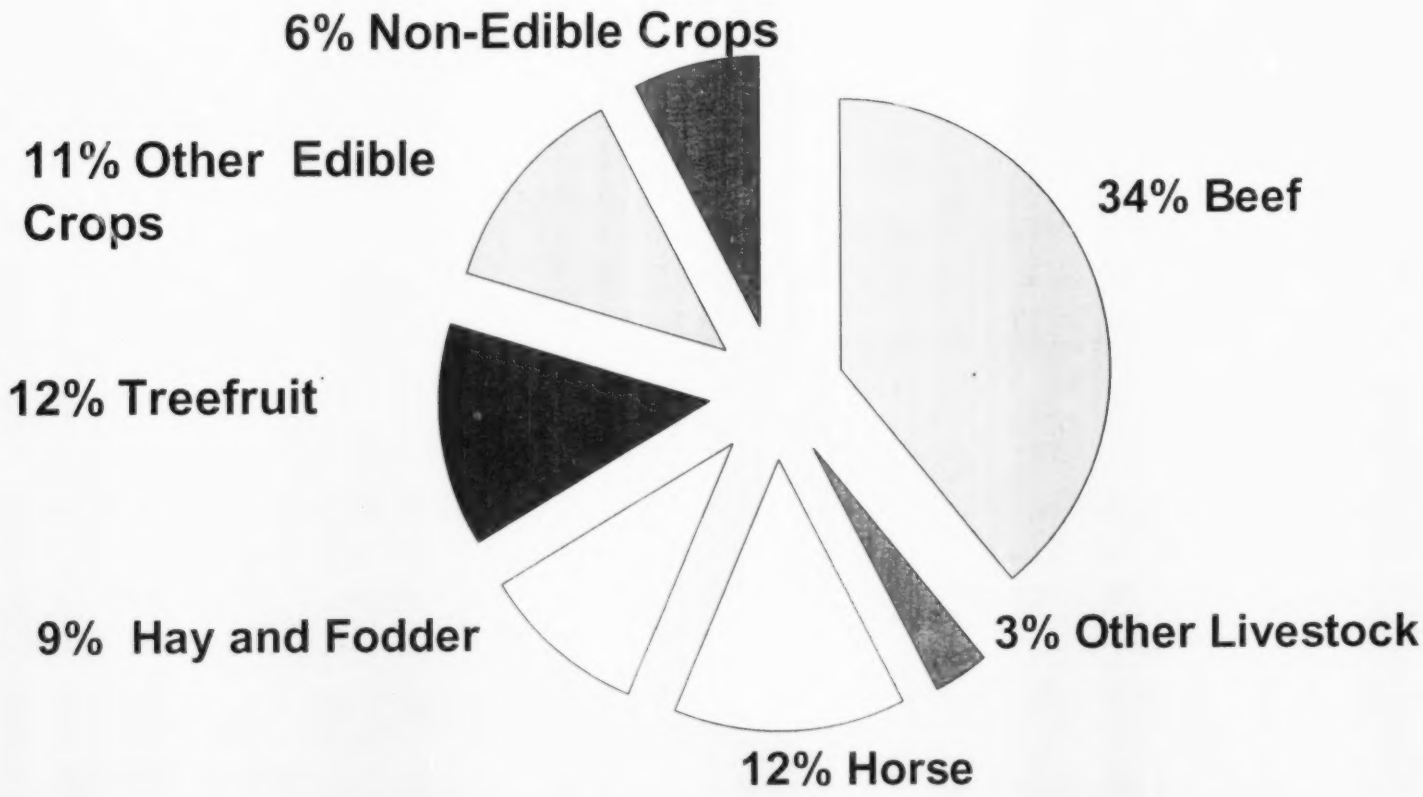
Sales of <$10,000 by Farm Type



Non-edible crops – Floriculture, Nursery, Sod, Christmas Trees

Other Edible crops – Berries & Nuts, Treefruit, Greenhouse Vegetables, Field Vegetables, Grains & Oilseeds

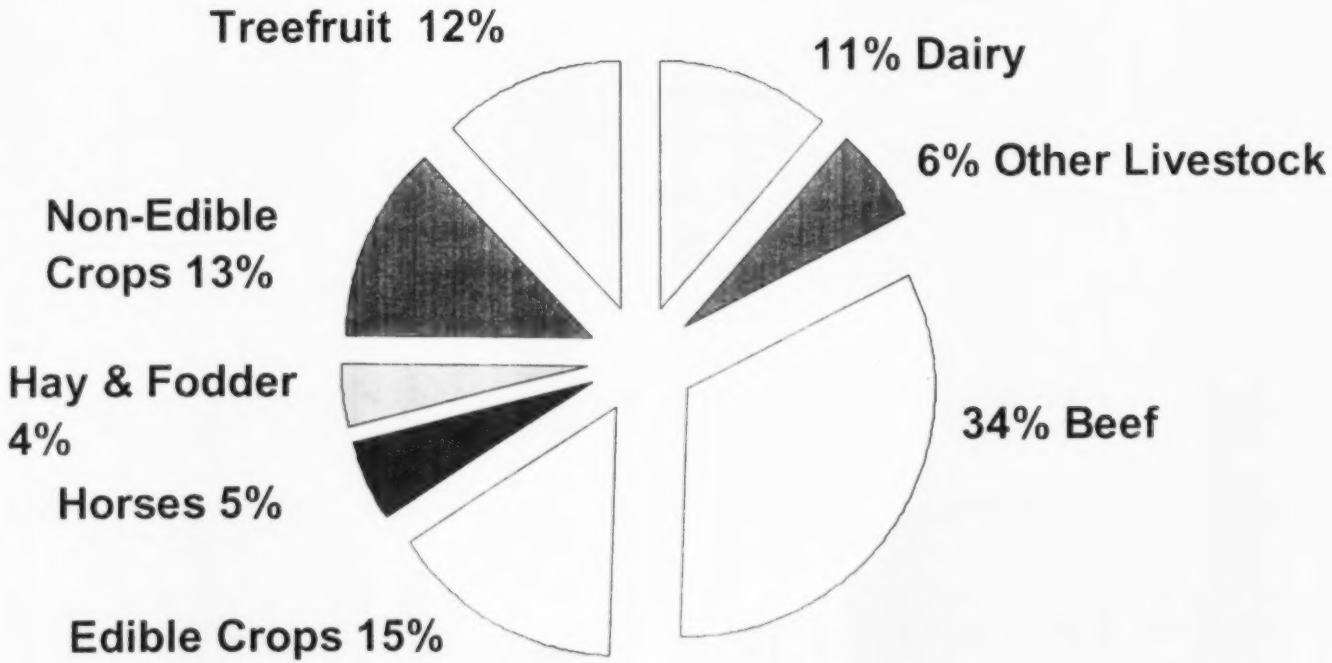
Sales of $10,000 - $100,000 by Farm Type



Non-edible crops – Floriculture, Nursery, Sod, Christmas Trees

Other Edible crops – Berries & Nuts, Field Vegetables, Greenhouse Vegetables, Grains & Oilseeds

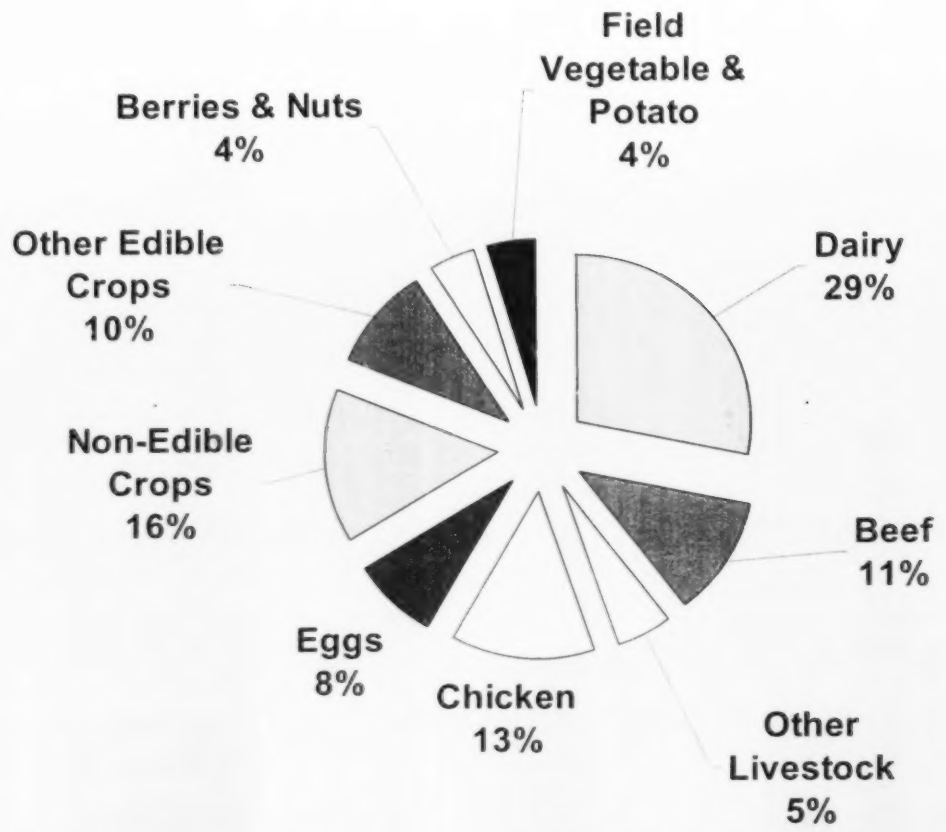
Sales of $100,000 - $249,999 by Farm Type



Non-edible crops — Floriculture, Nursery, Sod, Christmas Trees

Edible crops – Berries & Nuts, Field Vegetables, Greenhouse Vegetables, Grains & Oilseeds

Sales of > $250,000 by Farm Type



Non-edible crops – Floriculture, Nursery, Sod, Christmas Trees

Other Edible crops – Berries & Nuts, Treefruit, Field Vegetables, Greenhouse Vegetables, Grains & Oilseeds

Major agricultural sector ranking

Commodities 1998-02 average	$ Mil.	
Floriculture & Nursery	356.2	**19%**
Dairy products	348.7	**19%**
Poultry & Eggs	314.9	**17%**
Cattle & Calves	307.3	**17%**
Vegetables	233.3	**13%**
Fruit	165.7	**9%**
Grains & Oilseeds	55.8	**3%**
Hogs	42.3	**2%**
Forest Products	22.2	**1%**
Misc (furs, wool, honey, sheep)	15.5	**1%**
Total	$1,862	

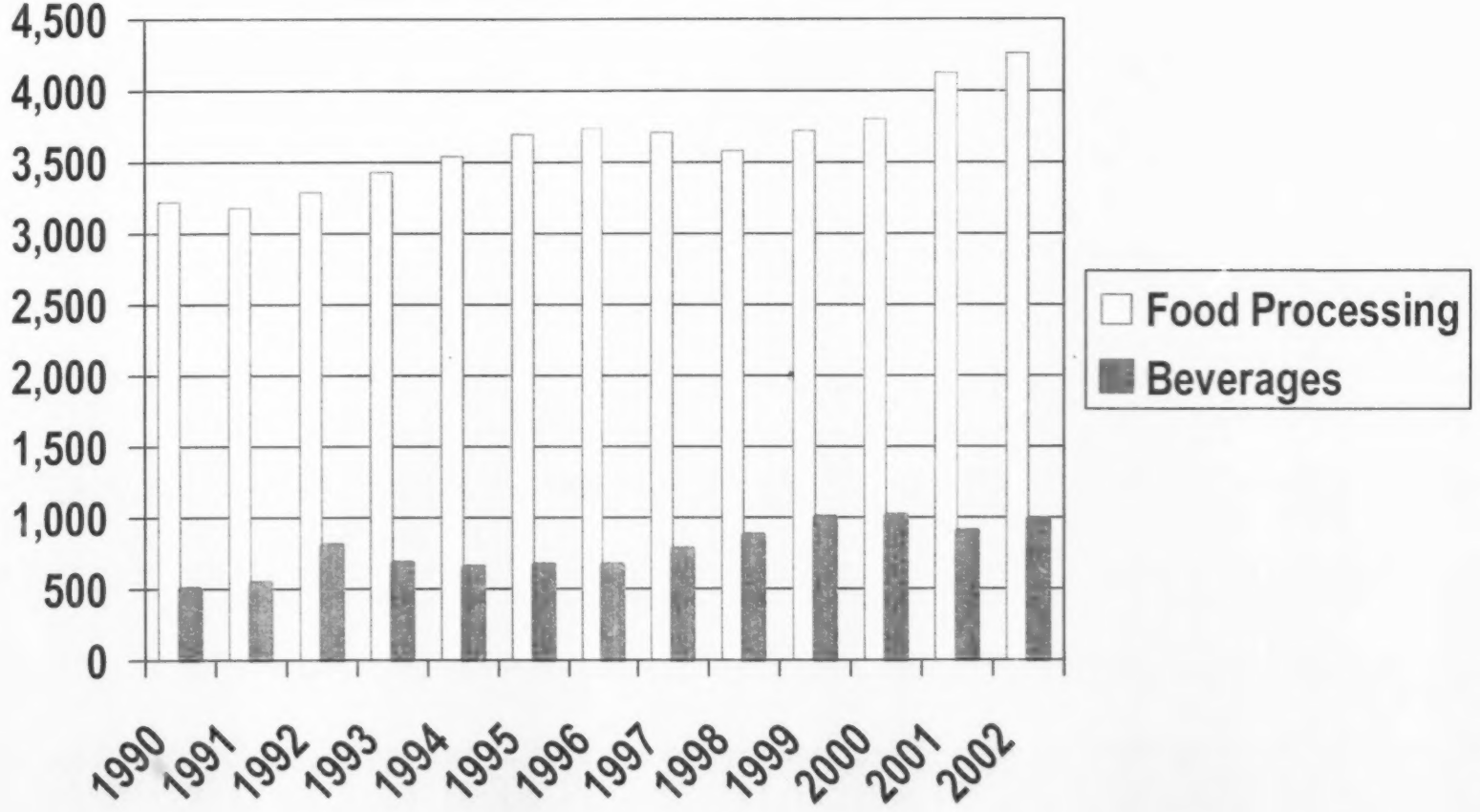
Source: Statistics Canada, Farm Cash Receipts

Regional Distribution of Gross Receipts, (2001 Census Farms)

	Census Farms (number)	% of Census Farms	Gross Receipts ($millions)	% of Gross Receipts
All BC	20,290	100.0%	2,308	100.0%
Vancouver Island - Coast	2,810	13.8%	138	6.0%
Lower Mainland - Southwest	5,733	28.3%	1,441	62.4%
Thompson-Okanagan	5,679	28.0%	393	17.0%
Kootenay	1,380	6.8%	59	2.6%
Cariboo	1,817	9.0%	102	4.4%
North Coast	152	0.7%	2	0.1%
Nechako	945	4.7%	52	2.3%
Peace River	1,774	8.7%	119	5.2%

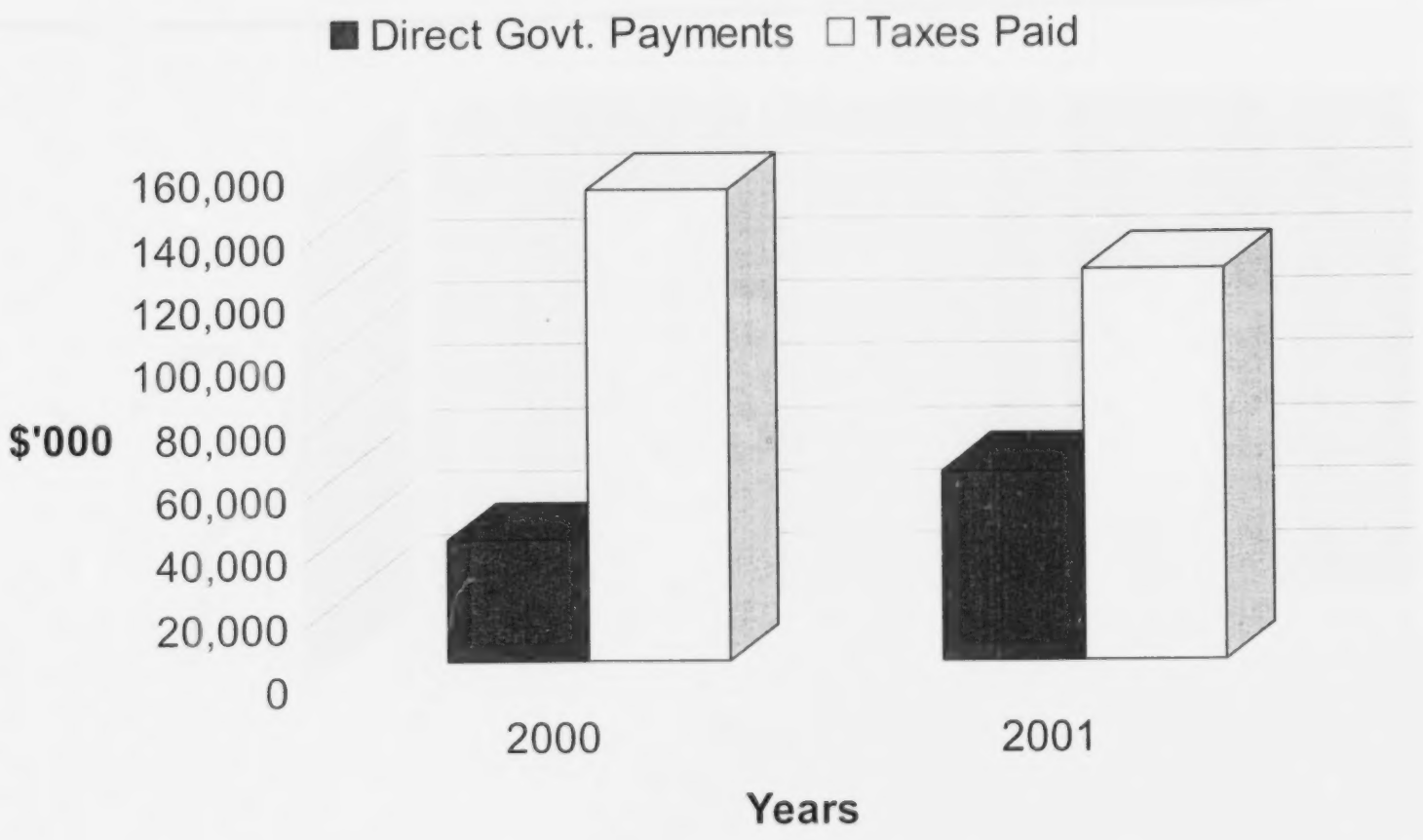
Source: Census of Agriculture 2001

Value of Food and Beverage Shipments, B.C. ($ millions)

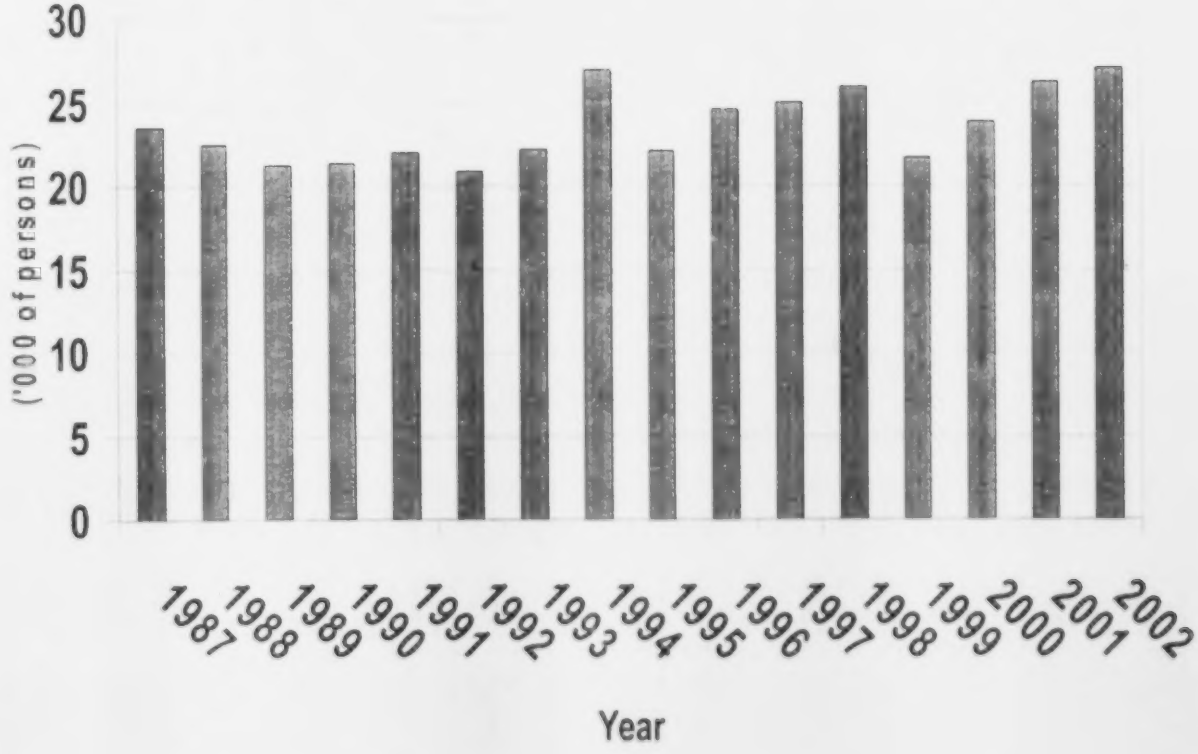


Source: Statistics Canada; Marketing and Dissemination Section

Direct Government Payments to B.C. Farmers vs. Taxes Paid



Employment in Food and Beverage Manufacturing in BC (thousands of persons)



Source: Statistics Canada, Labour Force Survey

B.C. Agricultural Commodities – Ten Year Growth

	Commodities	1993 $'000	2002 $'000	Growth % chg
1	Tomatoes (greenhouse)	10,230	120,758	1,080.4
2	Cherries, Sweet	1,919	14,050	632.2
3	Canola	6,247	28,068	349.3
4	Sweet Peppers (greenhouse)	10,987	43,891	302.8
5	Blueberries	11,751	43,500	270.2
6	Furs	2,891	8,466	192.8
7	Honey	2,724	7,294	167.8
8	Table Potatoes	24,221	63,891	163.8
9	Grapes	8,890	21,890	146.2
10	Floriculture	122,116	283,624	132.3

Source: Statistics Canada, Farm Cash Receipts

Agri-food Expenditures by Provincial Ministries compared with Provincial Agriculture GDP & Agrifood GDP

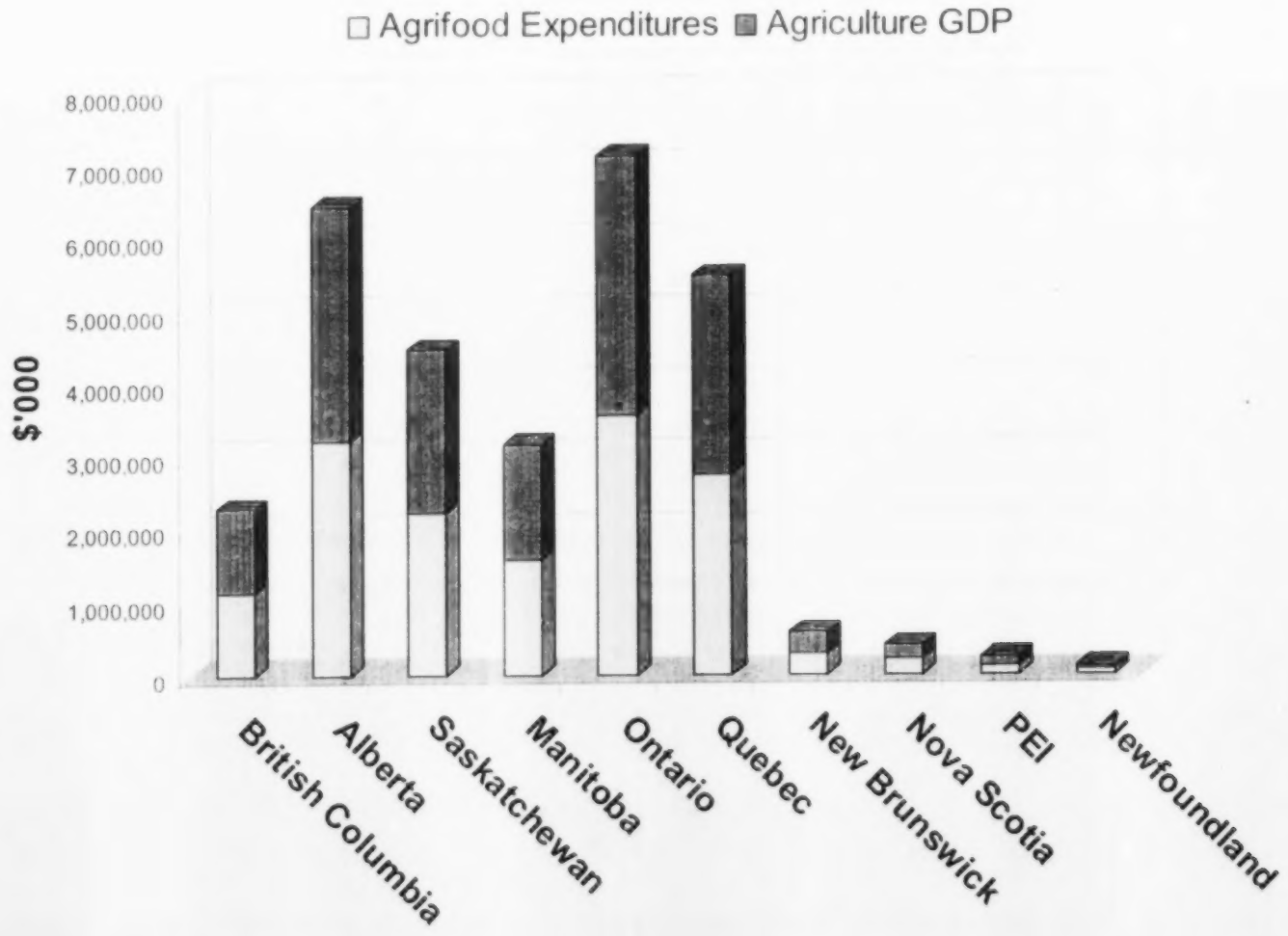
Province	Agri-food Expenditures 2001/02	Agriculture GDP 2001/02	Agri-food GDP 2001/02	Agri-food Expenditure/Agriculture GDP Ratio 2001	Agri-food Expenditure/Agri-food GDP Ratio 2001/02
	($'000)	($'000)	($'000)	%	%
British Columbia	62,936	1,147,170	2,123,910	5.49	2.96
Alberta	790,811	3,228,140	5,385,730	24.50	14.68
Saskatchewan	341,421	2,240,050	2,527,620	15.24	13.51
Manitoba	114,065	1,590,680	2,321,420	7.17	4.91
Ontario	347,213	3,575,500	12,484,220	9.71	2.78
Quebec	543,699	2,753,260	7,159,230	19.75	7.59
New Brunswick	17,166	295,550	626,790	5.81	2.74
Nova Scotia	39,190	209,030	642,360	18.75	6.10
PEI	22,626	128,230	320,260	17.64	7.06
Newfoundland	8,835	62,740	301,100	14.08	2.93

Sources: AAFC for Agri-food expenditures and GDP data by province. Statistics Canada for farm cash receipts by province.

Notes: The agri-food expenditures are those of the provincial ministries only and exclude agri-food expenditures by other ministries in the same province.

They also exclude fish related (BC, NB, NS and Nfld.), forestry related PEI and natural resources related (Nfld.) expenditures

Agri-food Expenditures as a Proportion of Agriculture GDP



Sources: AAFC for Agri-food expenditures and GDP data by province. Statistics Canada for farm cash receipts by province.